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Case Study

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5P CONSULTING

CASE STUDY

A Law Firm's Digital Transformation Story: Automation, Data Integration, and Improved Business Processes on the Salesforce Platform

Client Story: Our client is a nationally recognized law firm that faced inefficiencies in handling the intake of potential clients. Their client base is made up of a high volume of class and mass action lawsuits. Our client needed a solution with enhanced standardization and onboarding so they purchased Salesforce's Service Cloud Voice.

Business Problem: Our client had an existing Salesforce platform, purchased Service Cloud Voice, and needed a Salesforce partner to integrate the solution. They brought in 5P Consulting because of our business process expertise to implement a comprehensive contact center solution using Service Cloud Voice integrated with Amazon Connect. This solution was built to qualify a client through standardized processes and questions to determine eligibility matches to class/mass action lawsuits.

Business Needs: They needed a solution that would streamline the intake process to help determine the eligibility of potential clients which would also enhance their overall operational efficiency and onboarding process.

They needed:

- A seamless service and telecommunications experience to aid in tracking results and client data in their CRM in an automated fashion.
- Interactive call flows for inbound/outbound activities that would guide conversations based on pre-defined logic, ensuring all necessary

information was being captured for matching client candidates to class action lawsuits.

- Track and manage the geographical address data of their clients for accurate case assessment.
- Text and social media communication integration to reach clients on their preferred channels, enhancing communication flexibility.
- Standardized templates and communication protocols to ensure consistency and compliance across all interactions.
- Voicemail and email activity tracking for in/outbound communications to enhance record keeping for immediate review and action on litigation activities.
- Routing mechanisms to ensure actions are taken by the first available agent reducing wait times and improving client satisfaction.
- Call Metrics Dashboards/Reports in an automated vs manual process to ensure critical issues are escalated efficiently.

What 5P did: The primary challenge was to standardize and automate the process to make it easy for agents to determine the eligibility of potential clients while ensuring accurate and efficient data collection and compliance. 5P completed all of the above needs and set up the contact center using SF Service Cloud Voice to include a Call Center, Voice & SMS conversations, digital channels, and CRM data in one place.

The Service Cloud Voice solution integrated with Amazon Connect gave our client a powerful system capable of handling various communication channels and managing CRM data efficiently. This resulted in a 360° data view from intake to case resolution.

Results: 5P Consulting delivered the following project deliverables:

- An enhanced end-to-end architecture in Salesforce integrated with various components such as: Geo Tracking, SMS and Facebook messaging, templates, call routing queues, reports, and dashboards.
- Created guided call flows that take an agent through all required questions to determine if a potential client is eligible for a class action.
- Implemented the ability to record transcripts of calls in real-time and match them to cases eliminating manual notes and reducing time.
- Standardize communications with the use of communication templates which aided in consistent communication language protocols and T&Cs.

- Implemented real-time supervisor monitoring which allows the team to monitor calls to help with quality control to ensure proactive risk management.
- Created dashboards and reports to display call metrics & analytics for real-time supervisor monitoring to ensure compliance.

Conclusion:

5P Consulting partnered with our client to integrate a comprehensive solution that met their primary goal of handling client intake & qualification within their existing Salesforce platform. The solution we implemented provided new business processes and automation to streamline their operations, provided greater access to their data, and overall a more responsive client experience.